Grain Transportation Report

A weekly publication of the
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Contents

The next release is June 24, '04

Surging Sales of Heavy-Duty Trucks and Trailers Should Benefit Grain Shippers: Despite persistent high fuel prices, recent industry reports indicate an increasing demand for large trucks and trailers, or big-rigs, through the end of 2004. Officials of two major truck manufacturers predict truck sales could reach record numbers this year. Sales of heavy-duty trucks in 2004 are projected to total between 210,000 and 220,000, compared with 164,000 in 2003, according to the general manager of a major truck manufacturer. In addition, first quarter 2004 survey findings by CK Marketing and Communications, a research firm that monitors truck trailer production and sales activity, reveal that total trailer shipments to customers increased by 15.7 percent over the previous quarter and 21.7 percent over the first quarter of 2003. The trucking fleets participating in the survey operate a combined total of 19,000 power units and 49,000 trailers of all types and have indicated plans to buy new or used power units and trailers this year.

Fast-paced heavy-duty truck and trailer sales should be welcome news for grain shippers. With favorable producer prices for corn and soybeans this year and ongoing rail service problems in the Midwest, transportation could be tight when the fall harvest gets underway in September. Grain truckers could be on the receiving end of more business. In addition, many grain-producing areas of the Midwest have lost rail lines. Heavy-duty trucks with modern large-capacity trailers are the only way to move grain out to local elevators or to more distant markets.

Several factors help explain increasing heavy-duty truck sales, including an improved economy that is generating more freight for truckers to haul and rising truckload freight rates providing trucking firms with more money to spend. New government regulations aimed at improving truck safety and minimizing exhaust emissions are also pushing truck sales. New modern heavy-duty trucks are also more fuel efficient. Operating newer trucks with improved fuel economy and adding fuel surcharges to freight bills help grain truckers cope to some extent with high fuel costs. In addition, farmers are continuing to replace small farm trucks of 200 to 300-bushel capacity with semi-tractor trailers or big-rigs that hold 700 to 1,000 bushels of grain.

Grain trucking firms are increasing purchases of new trailers also because increased profits from hauling corn and soybeans are being used to upgrade to new longer hopper-bottom grain trailers with 1,000-bushel capacity. Grain truckers prefer larger hopper-bottom trailers, which can be up to 49 feet long, over the smaller 38 to 40-foot trailers common in the 1970s and 80s because the larger trailers can load and haul more grain and, thus, are more cost effective, especially when truckers have to wait in long lines at grain elevators to unload. *John.Batson@usda.gov*

Grain Transportation Indicators

Table 1--Grain transport cost indicators*

Week ending	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
06/16/04	115	94	84	195	185
Compared with last week	↓	↓	↓	↓	↓

*Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = nearby secondary rail market ($/car); barge = spot Illinois River basis (index = percent of tariff rate); and ocean = routes to Japan ($/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2--Market update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin--destination	6/11/2004	6/4/2004
Corn	IL--Gulf	-0.36	-0.40
Corn	NE--Gulf	-0.38	-0.43
Soybean	IA--Gulf	-0.67	-0.34
HRW	KS--Gulf	-0.69	-0.68
HRS	ND--Portland	-1.11	-1.24

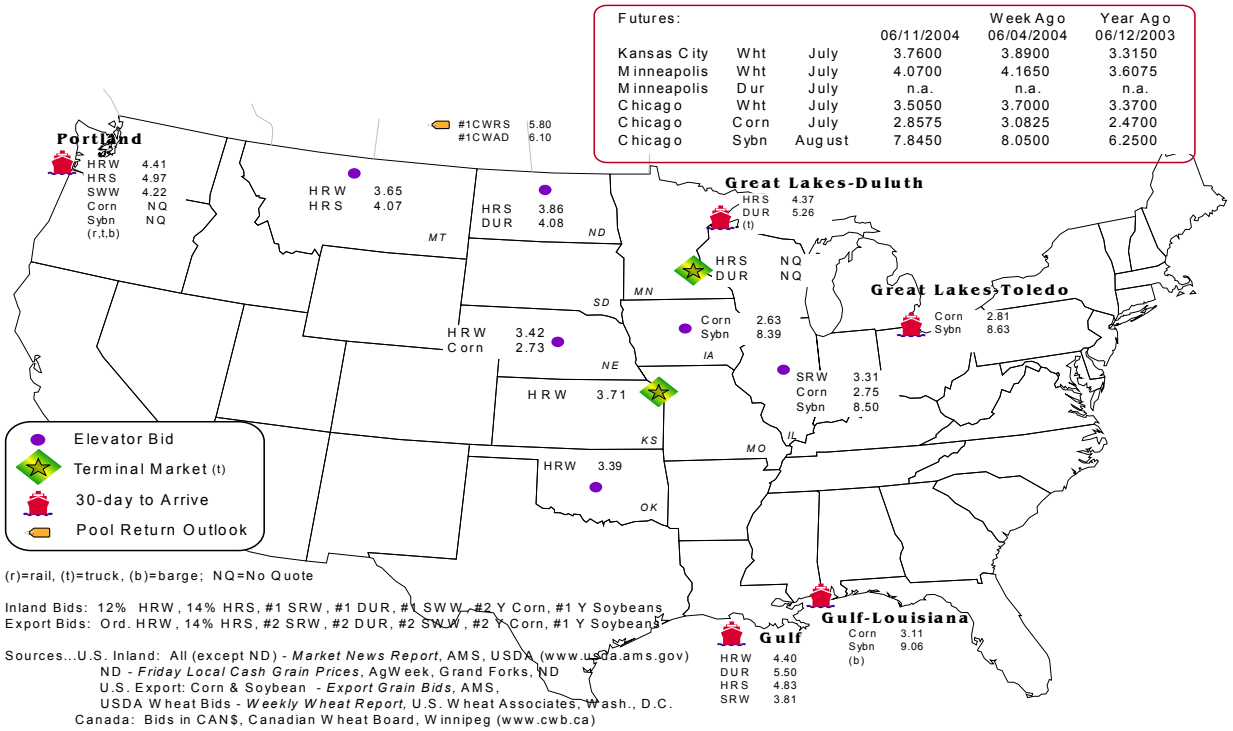
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1

Grain bid summary



Rail Transportation

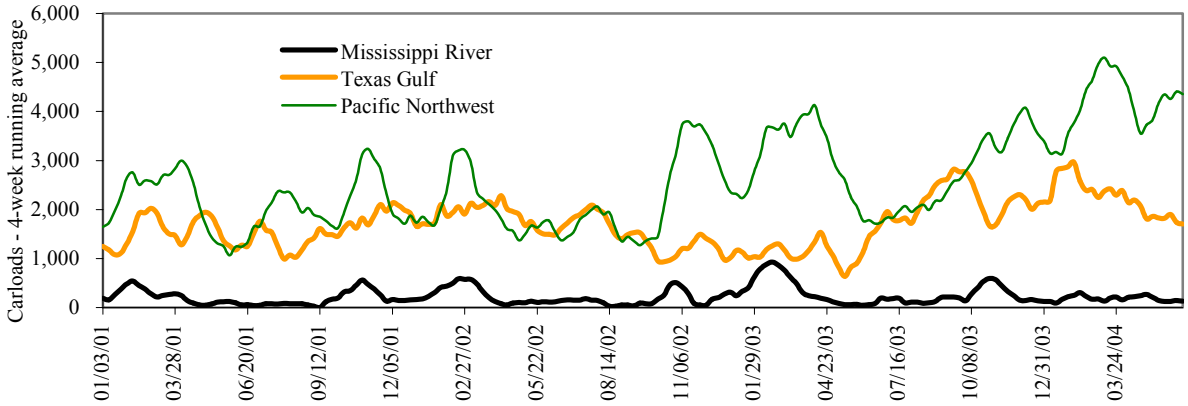
Table 3--Rail deliveries to port (carloads)*

Week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total
6/09/2004 [p]	49	2,046	3,883	28	6,006
6/02/2004 [r]	226	1,414	5,078	1	6,719
2004 YTD	4,295	51,064	97,416	3,832	156,607
2003 YTD	8,407	25,466	69,712	9,868	113,453
2004 as % of 2003	51	201	140	39	138
Total 2003**	14,934	88,118	150,530	20,509	274,091
Total 2002	10,937	84,625	111,832	20,842	228,236

(*) Incomplete Data; (**) Excludes 53rd week;YTD = year-to-date; p = preliminary data; r = revised data
Source: Transportation & Marketing Programs/AMS/USDA

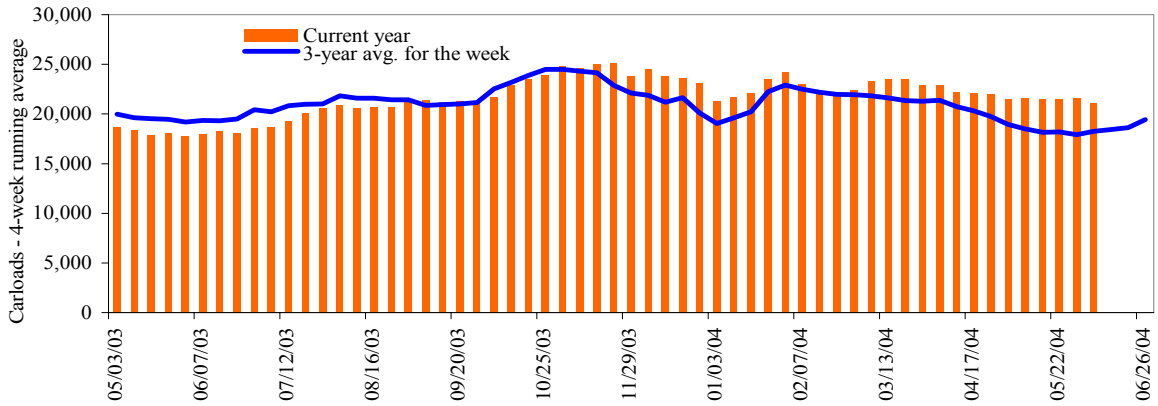
Railroads originate approximately 40 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2
Rail deliveries to port



Source: Transportation & Marketing Programs/AMS/USDA

Figure 3
Total weekly U.S. grain car loadings for Class I railroads



Source: Association of American Railroads

Table 4--Class I rail carrier grain car bulletin (grain carloads originated)

	East		West			U.S. total	Canada	
Week ending	CSXT	NS	BNSF	KCS	UP		CN	CP
06/05/04	2,742	2,886	7,826	300	5,405	19,159	4,091	4,177
This week last year	2,685	3,240	6,154	246	6,456	18,781	3,744	3,422
2004 YTD	64,114	72,141	199,494	11,055	146,228	493,032	103,510	81,348
2003 YTD	61,178	71,117	160,297	6,871	139,036	438,499	73,408	75,764
2004 as % of 2003	105	101	124	161	105	112	141	107
Total 2003*	146,395	171,260	416,371	24,506	336,079	1,094,611	197,993	198,185

Source: Association of American Railroads (www.aar.org); YTD = year-to-date; * Excludes 53rd week

Table 5--Rail car auction offerings ($/car)*

Delivery for:	July 04	Aug. 04	Sept. 04
BNSF[1]			
COT/N. grain	no offer	$27	$190
COT/S. grain	no offer	-$60	$2
UP[2]			
GCAS/Region 1	no offer	no bid	$1
GCAS/Region 2	no offer	$1	$2

*Average premium/discount to tariff, last auction

[1]BNSF - COT = Certificate of Transportation

N includes: ID, MN, MT, ND, OR, SD, WA, WI, WY, and Manitoba, Canada.

S includes: CO, IA, IL, KS, MO, NE, OK, TX, NM, AZ, CA, UT, and NV.

[2]UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

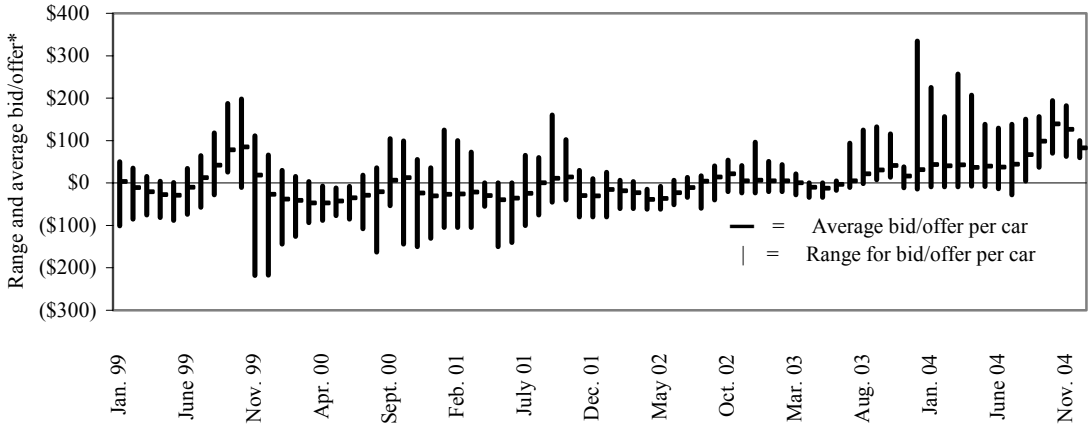
Source: Transportation & Marketing Programs/AMS/USDA

Rail service may be ordered directly from the railroad via **auction** for guaranteed service or tariff for nonguaranteed service or through the secondary market.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4

Secondary rail car market, delivery month-year



*up to 6 months of trading

Source: Transportation & Marketing Programs/AMS/USDA

Average bid/offer is the simple average of all the weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Range for bid/offer shows the range of average weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Table 6--Weekly secondary rail car market ($/car)*

	Delivery period			
Week ending	**July 04**	**Aug. 04**	**Sept. 04**	**Oct. 04**
BNSF-GF				
6/11/2004	$0	$54	$125	$124
Change from last week	-$3	-$11	-$13	-$1
UP-Pool				
6/11/2004	-$2	$8	$48	$108
Change from last week	$1	-$5	$0	n/a

*Average premium/discount to tariff, $/car-last week

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
Missing value = no bid quoted; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7--Tariff rail rates for unit and shuttle train shipments*

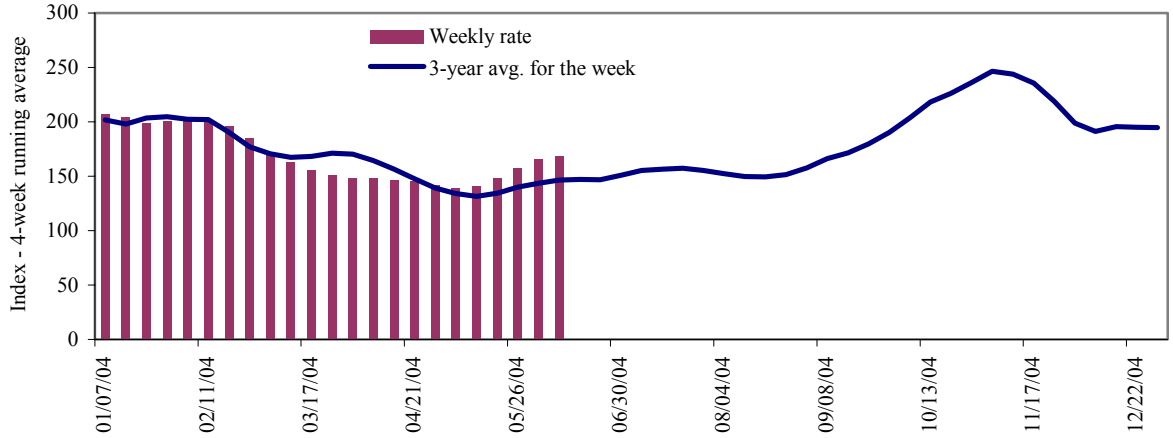
Effective date: 6/7/2004	Origin	Destination	Rate/car	Rate/metric ton	Rate/bushel**
Unit train*					
Wheat	Minneapolis, MN	Houston, TX	$2,120	$23.37	$0.64
	Kansas City, MO	Galveston, TX	$1,820	$20.06	$0.55
	Minneapolis, MN	Portland, OR	$4,148	$45.72	$1.24
	St. Louis, MO	Houston, TX	$2,095	$23.09	$0.63
	Kansas City, MO	Laredo, TX	$2,280	$25.13	$0.68
	Chicago, IL	Albany, NY	$1,834	$20.22	$0.55
	Chicago, IL	Richmond, VA	$1,961	$21.62	$0.59
Corn	Minneapolis, MN	Portland, OR	$3,240	$35.71	$0.91
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.77
	Council Bluffs, IA	Baton Rouge, LA	$2,170	$23.92	$0.61
	Evansville, IN	Raleigh, NC	$1,841	$20.29	$0.52
	Council Bluffs, IA	Stockton, CA	$3,496	$38.54	$0.98
	Kansas City, MO	Dalhart, TX	$1,745	$19.24	$0.49
	Columbus, OH	Raleigh, NC	$1,750	$19.29	$0.49
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.82
Soybeans	Minneapolis, MN	Portland, OR	$3,310	$36.49	$0.99
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.82
	Council Bluffs, IA	Baton Rouge, LA	$2,799	$30.85	$0.84
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.88
	Evansville, IN	Raleigh, NC	$1,841	$20.29	$0.55
	Chicago, IL	Raleigh, NC	$2,441	$26.91	$0.73
Shuttle Train*					
Wheat	St. Louis, MO	Houston, TX	$1,895	$20.89	$0.57
	Minneapolis, MN	Portland, OR	$3,993	$44.01	$1.20
Corn	Fremont, NE	Houston, TX	$2,425	$26.73	$0.68
	Minneapolis, MN	Portland, OR	$3,090	$34.06	$0.87
Soybeans	Council Bluffs, IA	Houston, TX	$2,255	$24.86	$0.63
	Minneapolis, MN	Portland, OR	$3,110	$34.28	$0.87

*A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

**Approximate load per car = 100 short tons: corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

Figure 5
Illinois River barge rate index - quotes



Note: Index = percent of tariff rate
Source: Transportation & Marketing Programs/AMS/USDA

The **Illinois River barge rate index** averaged 183 percent of the **benchmark tariff rates** between 1999 and 2001, based on weekly market quotes. The **index**, along with **rate quotes** and **futures market** bids are indicators of grain transport supply and demand.

Table 8--Barge rate quotes: southbound barge freight

Location	6/9/2004	6/2/2004	July '04	September '04
Twin Cities	206	209	214	261
Mid-Mississippi	168	170	177	242
Illinois River	163	169	172	238
St. Louis	127	131	136	223
Lower Ohio	115	117	138	239
Cairo-Memphis	118	114	131	219

Index = percent of tariff, based on 1976 tariff benchmark rate
Source: Transportation & Marketing Programs/AMS/USDA

Calculating barge rate per ton:
(Index * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 6).

Figure 6
Benchmark tariff rates

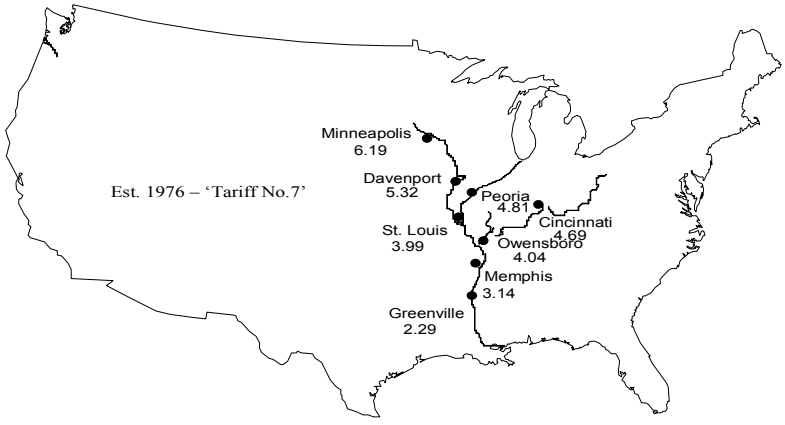


Table 9--Barge futures market (US$)*

Week ending	River/region	Contract period	Index rate	
			Futures	Cash
6/15/2004	St. Louis	July	n/a	145
		Sept.	n/a	225
		Oct.	n/a	245
		Nov.	n/a	185
		Dec.	n/a	155
	Illinois River	July	n/a	165
		Sept.	n/a	235
		Oct.	n/a	270
		Nov.	n/a	215
		Dec.	n/a	185

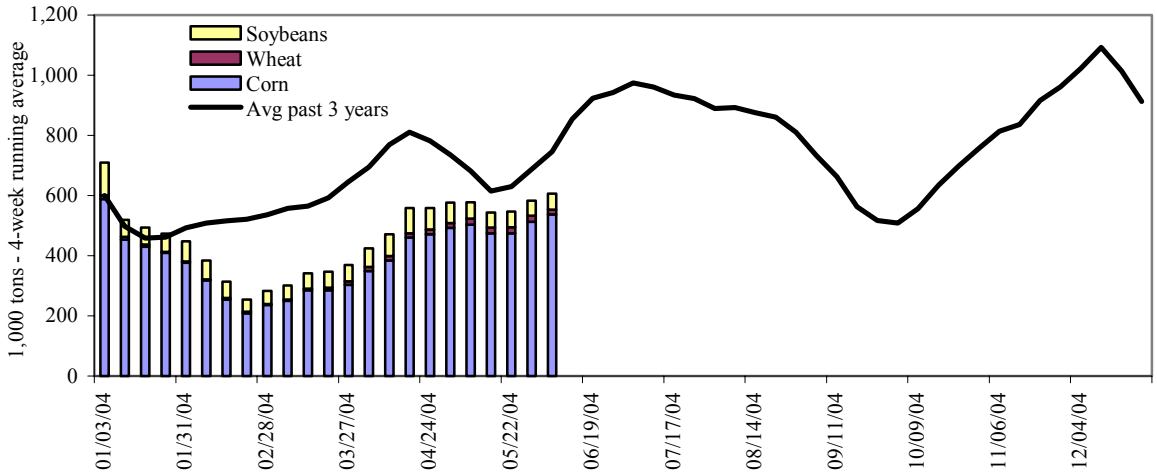
*Southbound barge freight nominal/cash basis values (US$)

Note: Index = percent of tariff, based on 1976 tariff benchmark rate

Source: Merchants Exchange of Chicago (www.merchants-exchange.com)

Figure 7

Barge movements on the Mississippi River (Lock 27 - Granite City, IL)



Source: Transportation & Marketing Programs/AMS/USDA

Table 10--Barge grain movements (1,000 tons)

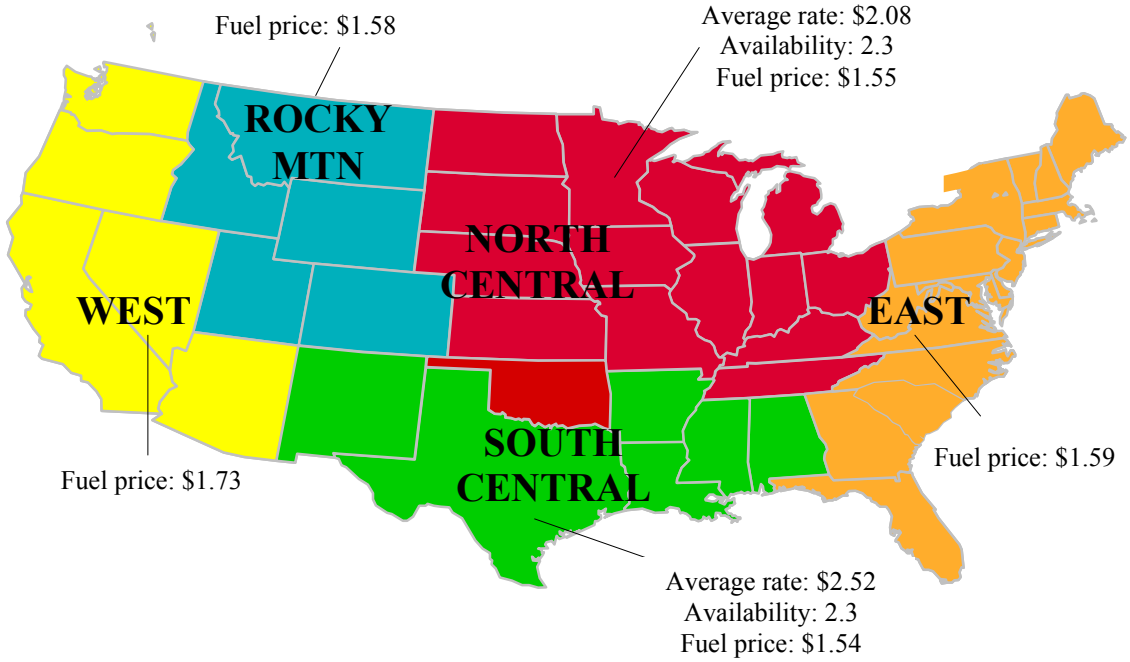
Week ending 06/05/04	Corn	Wheat	Soybean	Total
Mississippi River				
Rock Island, IL (L15)	285	9	17	325
Winfield, MO (L25)	432	12	42	488
Alton, IL (L26)	625	15	62	704
Granite City, IL (L27)	597	14	57	670
Illinois River (L8)	121	3	14	139
Ohio River (L52)	34	6	18	60
Arkansas River (L1)	0	17	10	28
2004 YTD	10,881	1,155	2,393	14,770
2003 YTD	12,280	718	4,125	17,528
2004 as % of 2003 YTD	89	161	58	84
Total 2003	29,898	2,787	9,146	42,526

YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1.

Source: U.S. Army Corp of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Truck Transportation

Figure 8
U.S. grain truck market advisory, 1st quarter 2004*



*Average rate per loaded mile, based on truck rates for trips of 25, 100, and 200 miles
Note: Fuel prices are a quarterly average (unit per gallon)
Fuel price data source: Energy Information Administration, U.S. Department of Energy, www.eia.doe.gov

Table 11--U.S. grain truck market overview, 1st quarter 2004

Region/commodity*	25 miles	100 miles	200 miles	Truck availability	Truck activity	Future truck activity
				Rating compared to same quarter last year		
	Rate per mile			1=Very easy to 5=Very difficult	1=Much lower to 5=Much higher	
National average[1]	**3.16**	**1.94**	**1.77**	**2.2**	**3.1**	**2.7**
North Central region[2]	2.69	1.82	1.74	2.3	3.3	2.7
Corn	2.77	1.92	1.83	2.1	3.2	2.9
Wheat	2.39	1.89	1.78	2.8	3.3	2.3
Soybean	2.68	1.92	1.91	2.0	3.4	3.0
South Central region[2]	3.63	2.06	1.87	2.3	2.7	2.6
Corn	3.65	2.04	1.80	2.5	2.5	2.8
Wheat	3.41	1.86	1.65	2.6	3.0	2.8
Soybean	3.77	2.21	2.08	2.0	2.6	2.3

Rates are based on trucks with 80,000 lb weight limit
*Commodity averages based on truck rates for top producing states based on National Agricultural Statistics Service/USDA
[1]National average includes: AR, CO, IA, IL, IN, KS, LA, MN, MS, ND, NE, OH, OK, OR, SD, TX, and WA.
[2]Commodity rates per mile include the average of the top 3 producing states within the region.
Source: Transportation and Marketing Programs/AMS/USDA

The weekly **diesel price** provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for truck grain movements, accounting for 37 percent of the estimated variable cost.

Table 12--Retail on-highway diesel prices*, week ending 06/14/04 (US$/gallon)

			Change from	
Region	**Location**	**Price**	**Week ago**	**Year ago**
I	East Coast	1.687	-0.013	0.248
	New England	1.810	-0.006	0.247
	Central Atlantic	1.780	-0.012	0.223
	Lower Atlantic	1.636	-0.013	0.259
II	Midwest	1.657	-0.018	0.247
III	Gulf Coast	1.635	-0.020	0.256
IV	Rocky Mountain	1.879	-0.042	0.430
V	West Coast	1.998	-0.065	0.428
	California	2.051	-0.070	0.400
Total	U.S.	1.711	-0.023	0.279

*Diesel fuel prices include all taxes.

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Grain Exports

Table 13--U.S. export balances (1,000 metric tons)

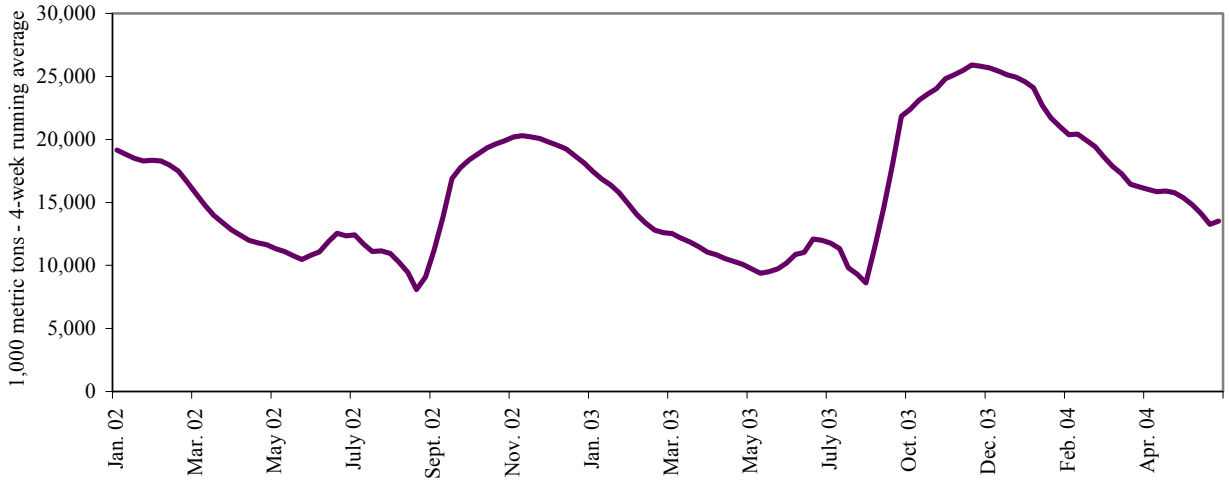
	Wheat						Corn	Soybeans	Total
Week ending 1/	HRW	SRW	HRS	SWW	DUR	All wheat			
6/3/2004	1,807	1,497	1,451	743	175	5,673	8,520	1,111	15,304
This week year ago	1,369	325	1,003	536	175	3,408	5,302	2,075	10,785
Cumulative exports-crop year									
2003/04 YTD	134	18	54	63	22	290	36,742	22,918	59,950
2002/03 YTD	121	13	90	53	0	276	30,325	26,378	56,979
2003/04 as % of 2002/03	111	138	60	119	0	105	121	87	105
2002/03 Total	6,896	2,899	6,645	3,517	720	20,677	39,646	28,908	89,231
2001/02 Total	8,704	5,485	5,554	3,127	1,133	24,003	47,460	29,838	101,301

Note: YTD = year-to-date. Crop year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31, 1/ = Current outstanding unshipped export sales to date

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Figure 9

U.S. grain, unshipped export balances, including wheat, corn, and soybean sales



Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 14--Select U.S. port regions - grain inspections for export (1,000 metric tons)

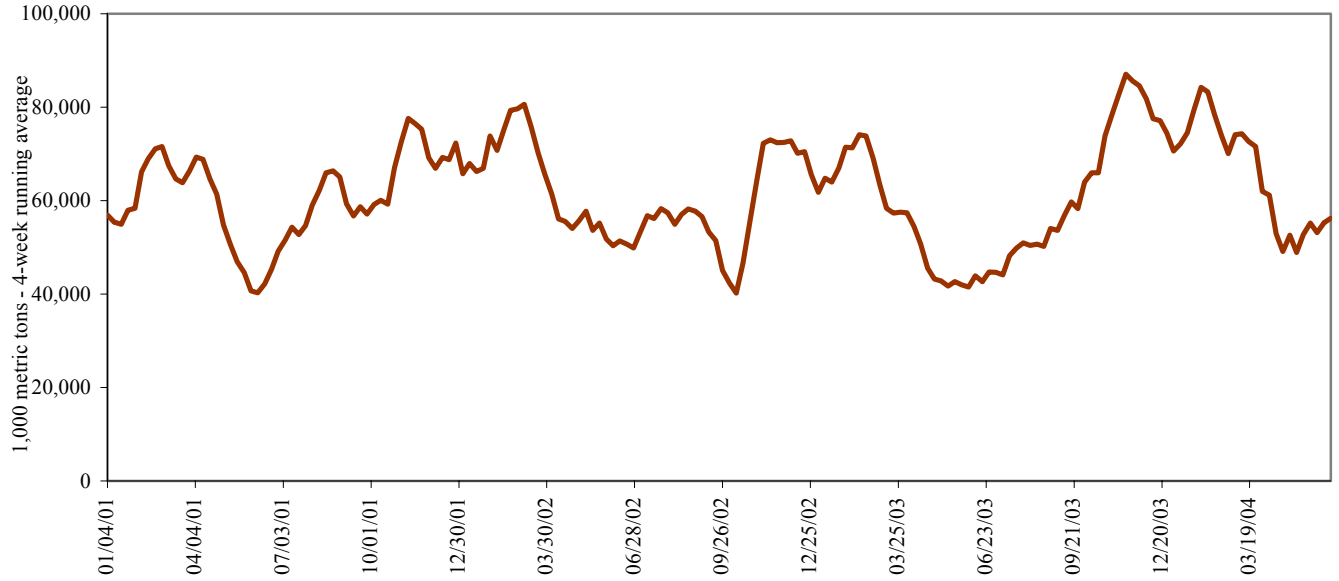
	Pacific Region			Mississippi Gulf			Texas Gulf			Port Region total		
Week ending	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Pacific	Mississippi	Texas
06/10/04	157	314	10	148	548	88	111	0	0	480	784	111
2004 YTD	5,268	5,244	1,774	3,448	14,763	5,699	4,496	49	14	12,286	23,910	4,559
2003 YTD	3,866	2,395	2,522	1,919	13,023	9,557	2,012	11	16	8,783	24,499	2,038
2004 as % of 2003	136	219	70	180	113	60	223	465	88	140	98	224
2003 Total	8,764	5,450	5,114	5,883	30,901	19,354	7,004	227	69	19,328	56,139	7,300

Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa); YTD: year-to-date

The United States exports approximately one-quarter of the grain it produces. On average, it includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Over 60 percent of these U.S. export grain shipments departed through the Mississippi Gulf region in 2003.

Figure 10

U.S. grain inspected for export, including wheat, corn, and soybeans



Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa)

Ocean Transportation

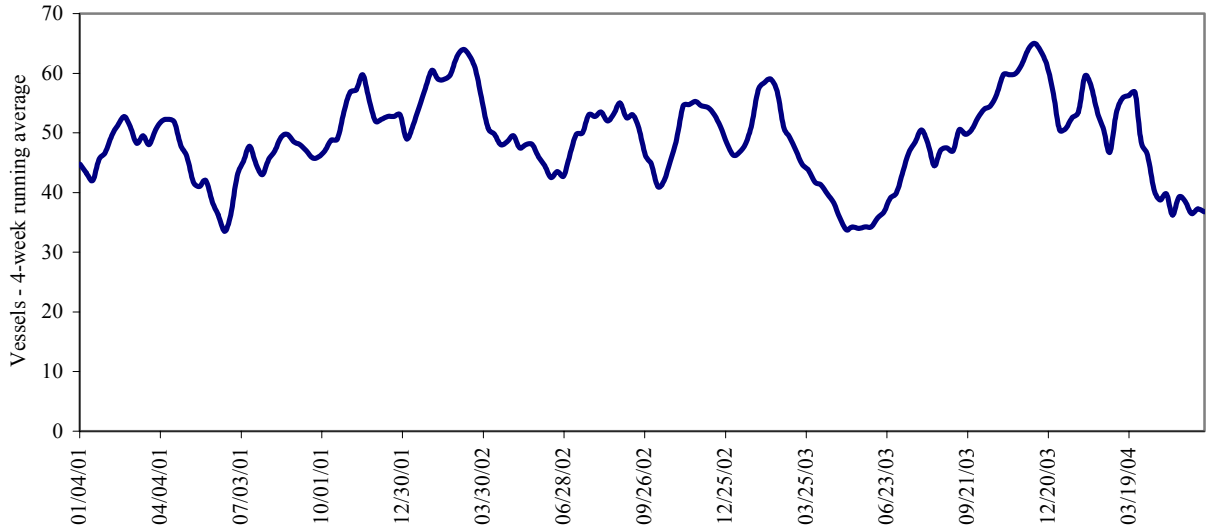
Table 15--Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
6/10/2004	12	38	44	10	7
6/3/2004	15	36	43	11	5
2003 range	(11..47)	(30..76)	(39..93)	(3..13)	(1..15)
2003 avg.	31	49	62	9	6

Source: Transportation & Marketing Programs/AMS/USDA

Figure 11

Gulf Port grain vessel loading (past 7 days)



Source: Transportation & Marketing Programs/AMS/USDA

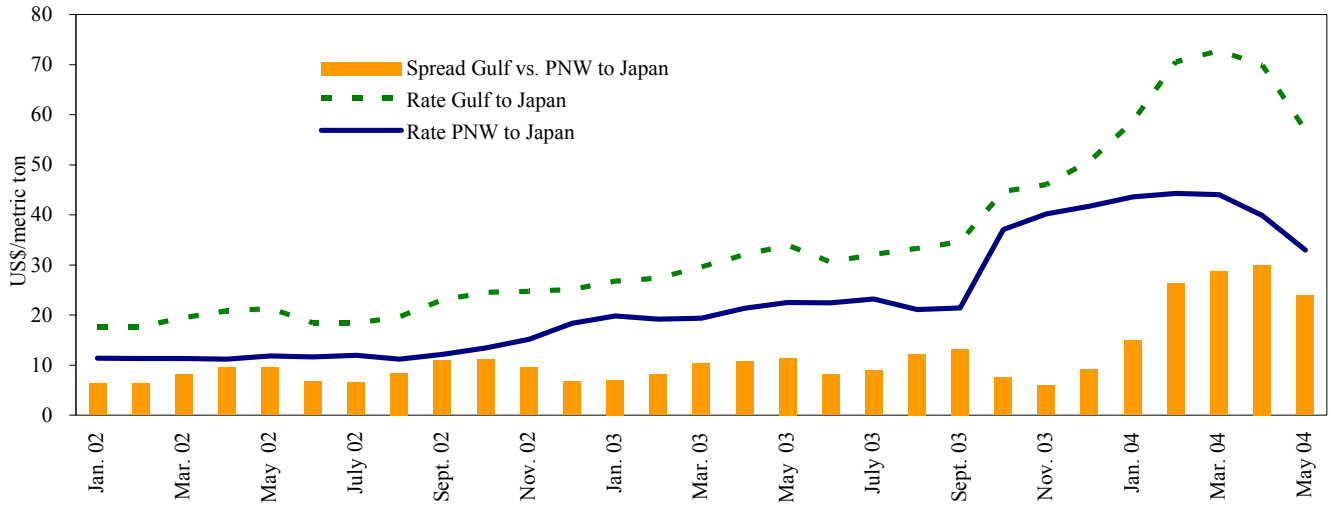
Table 16--Quarterly ocean freight rates (average rates & percentage changes) (US$/metric ton)

Countries/ regions	2004 1st qtr	2003 1st qtr	Percent change	Countries/ regions	2004 1st qtr	2003 1st qtr	Percent change
Gulf to				**Pacific NW to**			
Japan	$73.75	$27.91	164	Japan	---	$19.43	---
Taiwan	$68.00	$26.50	157				
N. Europe	---	$14.50	---	**Argentina/Brazil to**			
N. Africa	$46.25	---	---	N. Africa	$61.17	$25.35	141
Med. Sea	$46.50	$14.50	221	Med. Sea	---	$25.35	---

Source: Maritime Research, Inc. (www.maritime-research.com)

Figure 12

Grain vessel rates, U.S. to Japan



Source: Baltic Exchange (www.balticexchange.com)

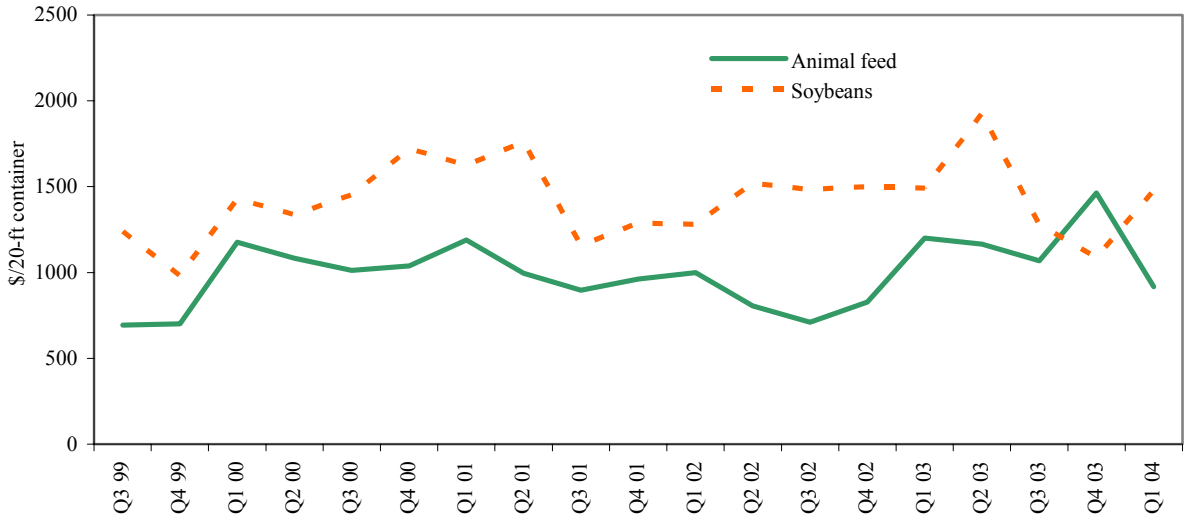
Table 17--Ocean freight rates for selected shipments, week ending 06/12/04

Export region	Import region	Grain	Month	Volume loads (metric tons)	Freight rate ($/metric ton)
St. Lawrence	Italy	Wheat	Jun 1/5	20,000	35.00
U.S. Gulf	Kenya*	Wheat	Jun 1/10	35,000	85.50
U.S. Gulf	Jamaica*	Wheat	Jun 20/30	1,330	97.00
U.S. Gulf	Djibouti	Wheat	Jun 1/10	41,900	67.90
U.S. Gulf	Guatemala*	Maize Bggd	Jun 20/Jul 20	20,000	80.00
River Plate	South Africa	Hvy grain	Jun 10/20	35,000	29.00
River Plate	Tunisia	Hvy grain	Jun 9/10	20,000	62.00
Uruguay	Morocco	Hvy grain	Jun 7/20	25,000	42.00

Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option
*Most food aid from the United States is required to be shipped on U.S. flag vessels. The vessels are limited in availability resulting in higher rates. In addition, destinations receiving food aid generally lack adequate port unloading facilities, requiring the vessel to remain in port for a longer duration than normal.
Source: Maritime Research Inc. (www.maritime-research.com)

Figure 13

Weighted average rates[1] for containerized shipments of animal feed and soybeans to selected Asian countries



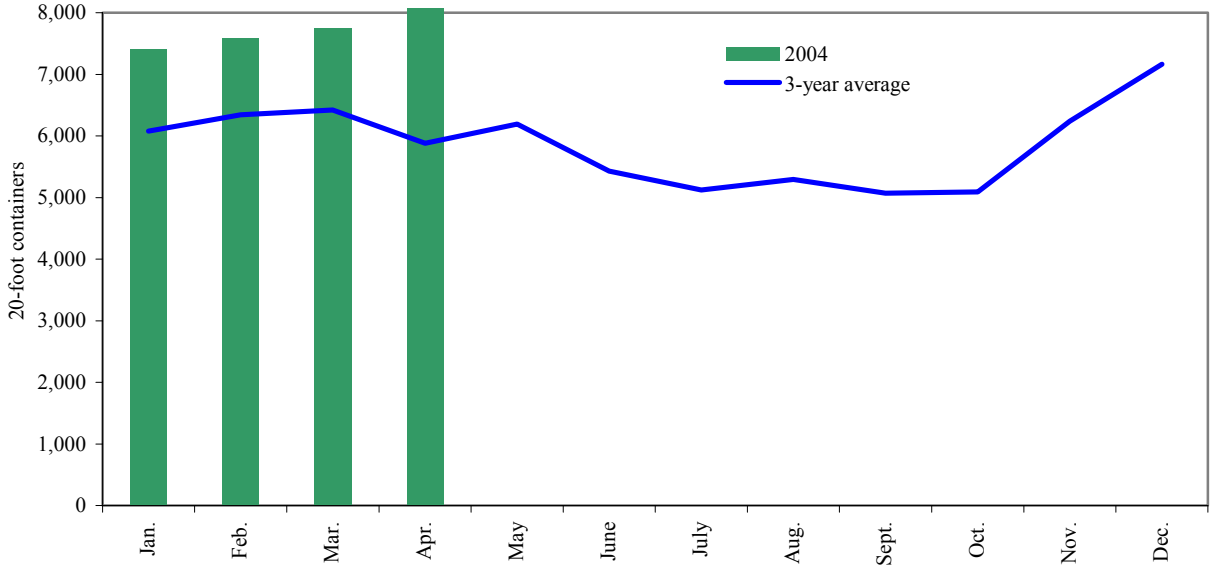
[1]Animal Feed: Busan-Korea (7%), Kaohsiung-Taiwan (46%), Tokyo-Japan (47%),
and soybeans: Bangkok-Thailand (2%), Busan-Korea (12%), Hong Kong (25%), Keelung-Taiwan (24%), Tokyo-Japan (37%)
January 2004.

Source: Ocean Rate Bulletin, Transportation & Marketing Programs/AMS/USDA

Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

Figure 14

Monthly shipments of containerized grain for 2004 compared with a 3-year average



Note: PIERS data is available with a lag of approximately 40 days

Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce*

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Related Websites

Agricultural Container Indicators	http://www.ams.usda.gov/tmd2/agci/
Ocean Rate Bulletin	http://www.ams.usda.gov/tmd/Ocean/index.asp